

## Initial Application

### (Step 1 of 2-Step Application Process)

The purpose of this Initial Application is to allow a property owner to apply for pre-approval for Program financing. Many property owners (the "Owner") find pre-approval useful to ensure their property and proposed project qualify for Program financing prior to the investment of substantial funds and staff resources for project development. If the property owner does not wish to obtain pre-approval both the Initial Application (Step 1) and the Final Application (Step 2) can be submitted at the same time.

The Program will review this Initial Application and determine if Program eligibility requirements are met. If so, the Owner will be issued an *Initial Reservation* for participation in the Program. Failure to meet Program deadlines (or to obtain extensions to deadlines) for preparation of the Final Application will result in a cancellation of the Conditional Reservation.

For more details about the application process, please see the Program Handbook.

#### **What to Submit**

- **Initial Application:** this document, with all sections completed.

#### **Where to Submit**

Initial Application materials may be submitted in one of the following ways:

- Email an electronic copy of this completed form to [info@CaliforniaFIRST.org](mailto:info@CaliforniaFIRST.org)
- Fax a copy of this completed form to (510) 451-7904
- Send one hardcopy of this completed form to:

CaliforniaFIRST Program  
500 12<sup>th</sup> St., Suite 300  
Oakland, CA 94607

#### **Contact**

For questions about the application process or your current status, please contact the Administrator at (510) 692-9995 or [info@CaliforniaFIRST.org](mailto:info@CaliforniaFIRST.org)



## 1. APPLICANT INFORMATION

Applicant Primary Contact (person to whom all communication will be directed)		
Name:	Title:	
Email:	Phone:	
Mailing Street Address:		
City:	State:	Zip:

## 2. PROPERTY INFORMATION

Property Physical Address		
Street:		City:
State:	Zip:	County:

Property Owner Type (check one)	
<input type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Partnership <input type="checkbox"/> Trust <input type="checkbox"/> 501(c)(3) Non-Profit Organization <input type="checkbox"/> Other: _____ <input type="checkbox"/> Individual(s) / Joint Tenants / Common Property (Not in Trust)	
Business Name:	Legal Business Name (if different):

Property Type (check one)	
<input type="checkbox"/> Office <input type="checkbox"/> Multifamily (5 or more units) <input type="checkbox"/> Retail <input type="checkbox"/> Food Service <input type="checkbox"/> Hotel/Hospitality <input type="checkbox"/> Warehouse <input type="checkbox"/> Industrial <input type="checkbox"/> Agriculture <input type="checkbox"/> Education <input type="checkbox"/> Hospital <input type="checkbox"/> Lab <input type="checkbox"/> Data Center <input type="checkbox"/> Other: _____	

Property Characteristics	
Is there currently a mortgage on the property?	<input type="checkbox"/> Yes <input type="checkbox"/> No



### 3. PROPERTY ELIGIBILITY

Review the property eligibility requirements provided in the Program Summary. By checking the box below, you are certifying the subject property's eligibility to receive program financing. Do not check the box if you do not understand the property eligibility requirements or have reason to believe your property does not conform to eligibility requirements. If you would like to request an exception to the eligibility criteria, please call (510) 692-9995.

Property Eligibility Requirements	Check to Certify
I have read the Program Summary and certify as to the subject property's conformance thereto.	<input type="checkbox"/>

### 4. PROPOSED PROJECT DETAILS

The Program allows property owners that are at the beginning of their property improvement process, as well as those that have a project completely planned out, to begin the process of applying for financing through the Program. To help the Program gauge where you are in the project development process, please check all of the following items that apply.

Project Development Status* (check <u>all</u> that apply)	Check
I have selected a project installation contractor. _____ (Contractor name and contact info)	<input type="checkbox"/>
I have selected a project lender. _____ (Lender name and contact info)	<input type="checkbox"/>

\* As a service to you, the Program may notify the contractor and/or project lender identified above of the status of your Initial Application unless you initial here \_\_\_\_\_.



**Project Details Table:** Please use the following table to provide summary details about the types of property improvements you think will be included in your project. If you are very early in your project development process and do not have an idea of what improvements you will include, just write in 'unknown' in the first Brief Description of Each Improvement field and leave the rest of the fields blank. If you do not know cost estimates for included improvements, then leave those cost fields blank.

Property Improvement Type* (check one)	Brief Description of Each Improvement** Provide whatever detail is known at this stage of project development (i.e. PV, HVAC, irrigation)	Cost Estimate (if known)
<input type="checkbox"/> EE <input type="checkbox"/> RE <input type="checkbox"/> WC		
<input type="checkbox"/> EE <input type="checkbox"/> RE <input type="checkbox"/> WC		
<input type="checkbox"/> EE <input type="checkbox"/> RE <input type="checkbox"/> WC		
<input type="checkbox"/> EE <input type="checkbox"/> RE <input type="checkbox"/> WC		
<input type="checkbox"/> EE <input type="checkbox"/> RE <input type="checkbox"/> WC		
<b>Total</b>		

\*Property Improvement Type Legend: EE=Energy Efficiency; RE=Renewable Energy Generation; WC=Water Conservation

\*\*Refer to the Authorized Improvements List document for system/subsystem descriptions to be used in the improvement descriptions

## 5. ESTIMATE OF TOTAL REQUESTED FINANCING AMOUNT

If an applicant is just beginning to develop the project plan, it may be challenging to estimate project costs with any real degree of accuracy. Please provide the best possible estimate of the total amount you wish to finance.

**Estimate of Total Requested Financing Amount:**    \$ \_\_\_\_\_